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World Textile Chemicals

Industry Study with Forecasts for **2012 & 2017**

Study #2426 | December 2008 | \$5700 | 399 pages

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Boosting growth will be the rising level of personal income worldwide, which will promote the production of textiles used in apparel, upholstery, household furnishings and floor coverings.

Global demand to rise 2.8% yearly through 2012

World demand for textile chemicals is projected to increase 2.8 percent per year to \$19 billion in 2012. Boosting growth will be the rising level of personal income in both developed and developing countries, which will promote the production of textiles used in apparel, upholstery, household furnishings and floor coverings. While colorants and auxiliaries will remain the biggest product segment, faster gains will be seen in finishing chemicals, which impart specific aesthetic, physical and functional properties to textiles. The Asia/Pacific region, China and India in particular, will continue to be the largest consumer of textile chemicals, and is also forecast to experience the fastest growth.

Textile finishing chemicals to post strongest gains

Textile finishing chemicals are expected to post the strongest gains through 2012, continuing a decade-old trend. While generally not necessary to the actual production of textile goods, finishing chemicals allow garment makers and other manufacturers of textile products to differentiate their products. Key types of finishing chemicals include wrinkle resists, softeners, hand modifiers, flame retardants and water repellents, as well as soil release and non-slip finishes, and products featuring protection against UV light. Global demand for finishing

Asia/Pacific
55%

North America
17%

Western Europe
11%

Other Regions
17%

World Textile Chemical Demand (\$16.6 billion, 2007)



chemicals will be driven by the growing emphasis on product quality throughout the global textile industry, as well as wider consumer demand for comfortable and durable apparel. In addition, increasing production of industrial/technical textiles will boost demand for various functional finishes such as flame retardants and water repellents.

Natural fibers to remain key market for chemicals

The replacement of natural fibers with less expensive, better performing manmade alternatives in many market applications will limit demand somewhat for reactive, vat and direct dyes, as well as sizing and preparation chemicals,

which are more commonly use in the processing of natural fibers. Nonetheless, natural fibers will continue to constitute a large share (almost 38 percent) of fiber demand and provide some opportunities, especially for higher-value non-chlorine bleaching agents (such as hydrogen peroxide) and other products such as finishing chemicals. Although natural fibers will remain the largest market for many textile chemicals, growth will also be strong for products which are designed to improve the comfort and performance of synthetic and cellulosic manufactured fibers (sometimes to imitate the look and feel of natural fibers).

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**Sample Text,
 Table & Chart**

ASIA/PACIFIC

Indonesia: Textile Fiber Outlook

Mill fiber consumption (including both manufactured and natural fibers) in Indonesia stood at 1.7 million metric tons in 2007. Sustained growth over the past couple of decades, per capita consumption rose to 7.5 kilograms in 2007, still below the regional average of other developing Asian countries offering low-cost factors of production. Indonesia has built a sizable export-led textile products manufacturing sector over the past 30 years, featuring significant apparel, woven and spun yarn segments. Manufactured fibers accounted for 65 percent of total fiber consumption, with both synthetic and cellulosic fibers well-represented. Natural fibers accounted for virtually all of the remainder. Demand for textile fibers is forecast to increase 1.2 percent per year to 1.73 million metric tons in 2012.

Indonesia's consumption of manufactured fibers is forecast to increase to 1.12 million metric tons in 2012, below real (inflation-adjusted) gains in the country's GDP over the same period. Indonesia's economy and income levels are forecast to post significant gains through 2012. This trend should benefit domestic demand for many textile products, including apparel and household goods such as bed sheets, towels and blankets. Stronger industrial output will boost indigenous demand for industrial fabrics. More important, the export sector should benefit from strong demand for synthetic and cellulosic fibers.

Natural fiber demand is forecast to increase to 0.61 million metric tons in 2012. Cotton consumption in Indonesia is forecast to increase to 0.5 million metric tons in 2012.

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**SAMPLE
 TEXT**

TABLE VI-7

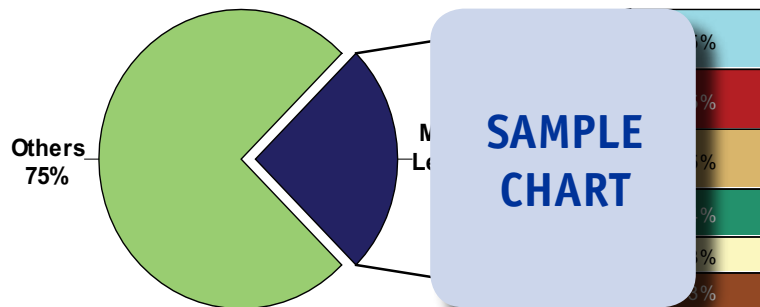
INDONESIA TEXTILE FIBER DEMAND

Item	1997	2002	2007	2012	2017
Population (million)	200	220	240	260	280
GDP per capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2006\$)	100	150	200	250	300
kg per capita	5	6	7.5	8	9
kg per 000\$ GDP	0.05	0.04	0.038	0.032	0.03
Textile Fiber Demand (000 metric tons)	1,000	1,200	1,700	1,730	1,760
Manufactured Fibers	650	780	1,100	1,120	1,150
Natural Fibers	350	420	600	610	610

**SAMPLE
 TABLE**

CHART VIII-3

**WORLD OTHER TEXTILE CHEMICAL MARKET SHARE, 2007
 (\$9.3 billion)**



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE VI-8
INDONESIA TEXTILE CHEMICAL DEMAND
 (million dollars)

Item	1997	2002	2007	2012	2017
Textile Fiber Demand (000 metric tons)17					240
\$ chemicals/m ton fiber					78
Textile Chemical Demand					15
Colorants & Auxiliaries					50
Coating & Sizing Chemicals					50
Finishing Chemicals					72
Other					73
% Indonesia					4
Asia/Pacific Textile Chem Demand	50				100

**SAMPLE
TABLE**

COMPANY PROFILES

Eksoy Chemical Industries Limited
 Yildizposta Cad. Akin Sitesi 2.Blok Da:32
 Gayrettepe, Istanbul
 Turkey
 90-282-726-7117
<http://www.eksoy.com.tr>

**SAMPLE
PROFILE**

Annual S
 Employr

Key Proc
 dyestuffs

Eksoy Chemical Industries Limited is a textile chemicals, including scouring and textile dyes. These products are manufactured at the Company's plant in Adana, Turkey. In addition to Turkey, the privately held company's textile chemicals are distributed primarily elsewhere in the Middle East and in Eastern Europe. Among Eksoy Chemical's specific export markets are Syria, Iran, Poland and Greece, as well as Egypt and the US.

The Company's textile chemicals include products for textile pretreatment, finishing and dyeing operations. Pretreatment chemicals from Eksoy Chemical include EWET scouring and wetting agents, AMILAZ desizing agents, EXOLINE metal complexing agents, GRES OFF degreasing agents, ANTISIL sequestering agents, COTO-BLEACH and COMBIDYE bleaching powders, BIOPOLISH enzymes, EXOLUBE crease preventing agents, and BIODIE and PERTONE peroxide stabilizers. The Company's textile finishing products include EXOLINE pH regulators, FLORFINISH fluorocarbon resins, UNISIL softeners and FIRE-OFF flame retardants. Products for textile dyeing applications include a range of dye auxiliaries, as well as numerous

"Demand for textile chemicals in Indonesia is forecast to increase just under one percent annually to \$330 million in 2012. Demand will be supported by the nation's continued economic expansion and the increasing use of higher-value chemicals to meet the needs of Indonesia's textile export industry. As a result, best prospects are for finishing chemicals. However, Indonesia still relies heavily on commodity chemicals. In addition, ..."

--Section VI, pg. 182

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OTHER STUDIES

World Catalysts

Global catalyst demand will expand 6% annually through 2012. Polymerization catalysts will grow the fastest based on rapid expansion in polymer capacity in developing regions and a shift toward higher cost/more efficient catalysts. Enzyme and organometallic catalysts will be the fastest growing materials. This study analyzes the \$12 billion world catalyst industry, with forecasts for 2012 and 2017 by material, product, market, world region and for 28 countries. It also evaluates market share and profiles industry players.

#2407 10/2008..... \$5900

Paint & Coatings

US demand for paint and coatings will rise 3.1% annually through 2012, aided by an improving outlook for construction and manufacturing activity and favorable export opportunities. A rebounding residential market will pace the dominant architectural paint segment, with interior paint outpacing exterior. This study analyzes the \$19.7 billion US paint and coating industry, with forecasts for 2012 and 2017 by market, application, end use and formulation. It also evaluates company market share and profiles industry players.

#2386 08/2008..... \$4600

Enzymes

US demand for enzymes will grow 6% annually through 2012. Advances will be led by continued rapid expansion in the fuel ethanol segment of the starch processing enzyme market, as well as strong growth in the large pharmaceutical and smaller biocatalyst and pulp and paper markets. Animal feed will also contribute to gains. This study analyzes the \$1.9 billion US enzyme industry, with forecasts for 2012 and 2017 by market and product. It also evaluates market share and profiles industry competitors.

#2351 06/2008..... \$4600

World Flame Retardants

World flame retardant demand will grow 4.7% per year through 2011. Gains in developing countries will be driven by more stringent flammability regulations and the use of more plastics. More mature markets will experience an acceleration in demand due to an upswing in manufacturing. This study analyzes the \$3.6 billion world flame retardant industry, with forecasts for 2011 and 2016 by product, market, world region and 17 countries. It also details company market share and profiles major players.

#2277 12/2007..... \$5400

Pigments: Inorganic, Organic & Specialty

US color pigment demand will grow 4.4% yearly through 2011, driven by a shift toward high-performance organic pigments and specialty types. Metallic, pearlescent and other specialty pigments will lead gains based on the need for more novel, eye-catching optical effects in automotive coatings, printing inks, plastics, cosmetics and toiletries. This study analyzes the \$3 billion US pigments industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2232 08/2007..... \$4500

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